

TMA Central User Guide

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Foreword

This is a basic guide on how to use and navigate TMA Central which is the central client database for all TMA Programs. “TMA Central” contains all of the client’s information, verified service events and produces the MDS and ICTDS submissions. It is designed for the collection of all essential client information required by HACC funded services and also reflects the information collected by the CIARR.

Here are some definitions that will be referred to throughout this document.

Client: Any person who receives service from your organisation or brokered by your organisation. Clients can be Care Recipients or Carers.

Care Recipient: A person who receives service because of their own needs.

Carer: A person who receives service because they are the carer for a Care Recipient.

Basic navigation concepts

Left Clicking on a record or button will highlight or select it. A selected record will be highlighted in blue. Note: this is by default. If you have a different colour scheme selected in Windows the colours may be different.

Double Left Clicking on a record will open the record for editing.

Right Clicking on a record will display an options menu, listing the operations you can make to this record. You can select an option by Left Clicking on it. The basic options are “Insert” to create a new record. “Change” will open the record your cursor is on so you can view or modify it. “Delete” which will delete the record your cursor is on. Delete is not reversible. Other options may be listed allowing you to initiate actions specific to the screen you have open.

Greyed out data fields, if a data field is has a grey background it means you cannot change the data in it. These fields may be changed in another screen.

Data columns can be resized by Left Clicking and holding on the edge of the column and dragging it either left or right.

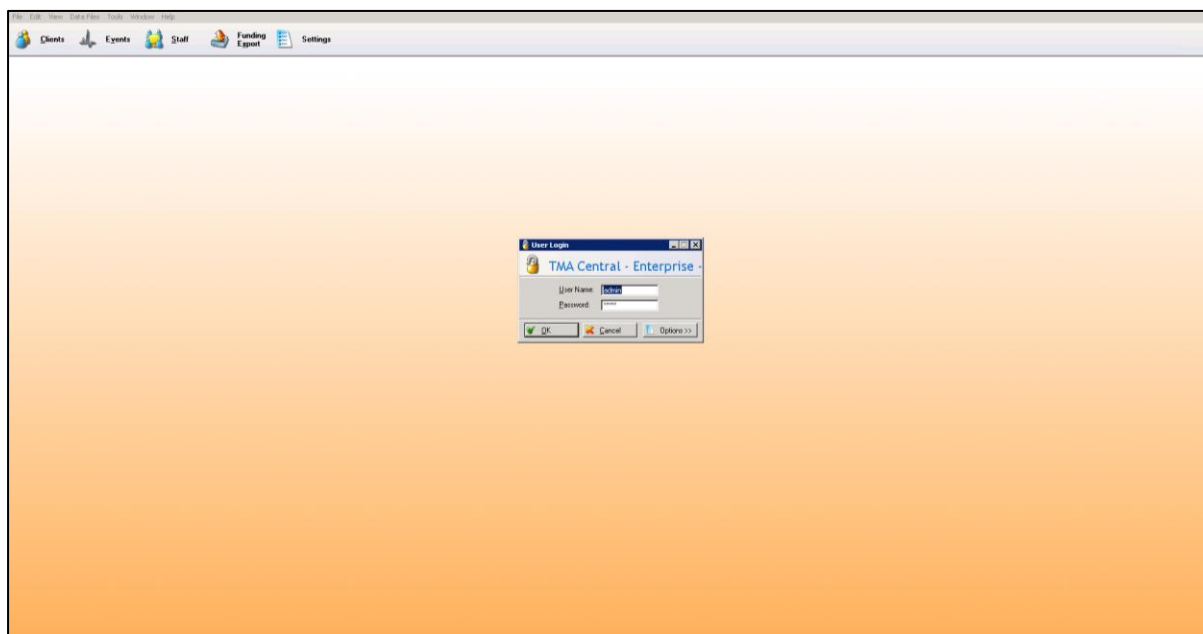
If you have any questions about this guide do not hesitate to contact me.

Regards,

Andrew Sturt

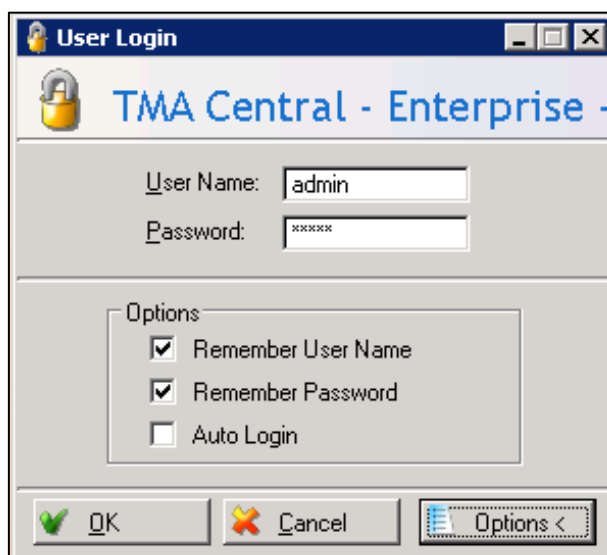
T 0240234822 | F 0249578211 | E andrew.sturt@tmasoftware.com.au | W www.tmasoftware.com.au

Welcome to TMA Central



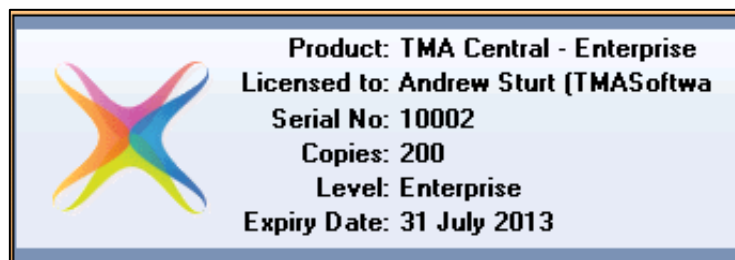
This is the first screen you will see when you open TMA Central. It will prompt you to enter a username and password, the default username is admin and the default password is admin.

If you left click on Options it will display some additional settings as below:



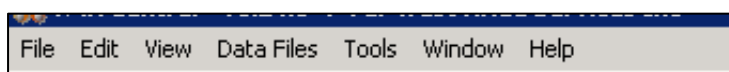
If you want to enable Auto Login please login first to ensure you have the right username and password, then close and reopen TMA Central then enable Auto Login.

License Information

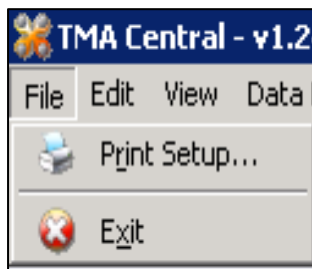


After you login in the bottom right corner of the screen you will see your TMA Central license information.

Main menu Breakdown



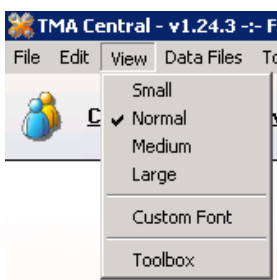
File



Print Setup – Allows you to select your default printer and define the printer settings

Exit - Closes TMA Central.

View



Selecting this item allows you to change the size of the font to small, normal, medium, large and custom.

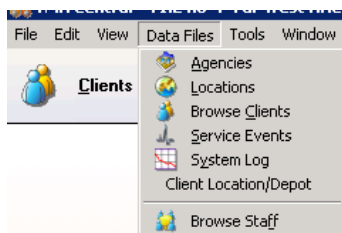
Toolbox - Selecting this item allows you to build your own floating toolbar. This works by first selecting Toolbox, then by holding CTRL and left clicking on the menu item you would like to add to your floating menu. Repeat to add additional items.

For example if I would like to add Clients to my floating menu I would Open the View menu then Left Click on Toolbox, then I would hold CTRL and click clients. This will add Clients to the Floating Menu. The Floating Menu can also be positioned as you see fit by Left

Click and holding on the Tearoff window title. To remove an item from the Floating Menu Right Click on it and select Delete.



Data Files



Agencies- Opens the Browse Agencies File window. This is where you can view, insert or modify Agency records. This is used to store contact information for HACC and welfare agencies your service deals with .

*Locations- Locations_*– Opens the Browse Suburbs/Towns window. This is where you can view, insert, modify or delete suburbs/towns and specify LGAs for them if you wish. It allows you to make your own suburbs/towns list from the Australian Postcode list.

Browse Clients–_Opens the Browse the Clients File window. This is where you can view and modify Client details. You can delete clients but generally they should be made Non-Current.

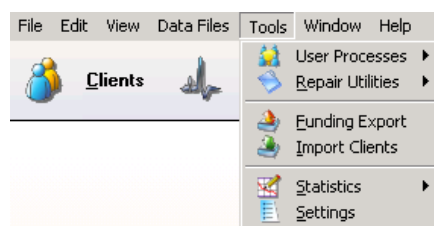
Service Events- Opens the Browse the Service Event file. This is where you can view and modify Service Events (occasions of service delivery to a client). Service Events are the measure of your organisation's production and are reported in the MDS and/or ICTDS. Although the majority of service events are transferred from the Trips, Caremaster and/or MnM programs you can enter service events (such as assessments) directly.

*System Log*_Opens the browse the system log file. Used for trouble shooting.

Client Location/Depot- Opens the Client Locations/Depot field. This is where you can view, insert and modify different depots for the purpose of client transport.

*Browse Staff*_-Opens the Browse the Staff file window. This is where you can view, insert, modify or delete Staff members.

Tools



Note: These tools were created over years of TMA Central development. They update the the client list so the effect of a new feature was implemented for the whole list.

User Processes-> Update Client Age – Selecting this will update the client age based on Date of Birth.

User Processes -> Flag Update for all clients – This utility will force all clients to be flagged for update, meaning all clients records in Trips, Caremaster and/or MnM will be updated when those programs are next opened or a Client Refresh is performed in them.

User Processes-> Update Account codes – Opens the Browse Current Clients file window. This is where you can change Account codes.

Repair Utilities-> Fix Last Assessment Date – This utility will attempt to rebuild the last assessment date for your original Ciarr data. Only use this if you have been advised by TMA Software.

Repair Utilities-> Fix Zone and LGA- This utility will attempt to rebuild the Zone and LGA information for your locations file. Only use this if you have been advised by TMA Software.

Repair Utilities-> Fix Date of Referral In- This utility will attempt to rebuild the Date of Referral in from your original Ciarr data. Only use this if you have been advised by TMA Software.

Repair Utilities-> Rebuild Client Full Name – Rebuilds the full name from surname, title and given name.

Repair Utilities-> Validate MDS Complete – The colour coding showing whether client records have full MDS information is checked and correctyed for the whole client list.

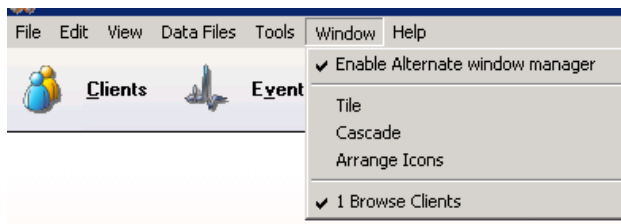
Funding Export- Opens the Export Wizard. Use this to send the MDS transmission to HACC. In NSW this wizard is also used to send the ICTDS to Transport NSW and separately the Health ICTDS to NSW Health.

Import Clients- You can export one or a selected number of clients assessment data from TMA Central to a another service that has TMA Central or the HADS program. You can also receive client assessment data from other services. This is where you import client data from other services into your TMA Central.

Statistics-> Clients- This Provides a chart of the number of clients ticked in each of the ten columns on the left of the client window in TMA Central.

Settings- This opens the Control Settings window. This is where you can view and modify TMA Central settings. Use with caution before changing.

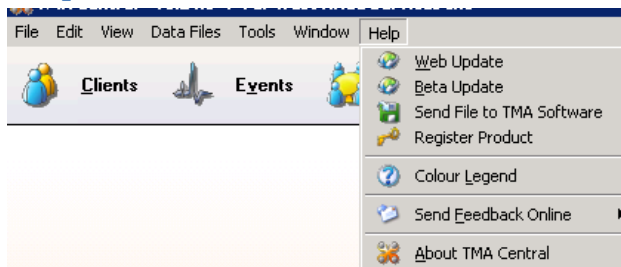
Window



Enable Alternate window manager – This menu item should always be ticked. If you have a build-up of the close, minimise and maximise windows buttons, check to make sure this item is ticked.

Tile, Cascade and Arrange Icons – This menu will also list all other windows you have open. You can change to an open window by Left Clicking on it in this menu.

Help



Web Update – This will update your program via the internet. DO NOT run this unless instructed by TMA or your IT support.

Register Product – This is where you can enter your license registration code. If you need a registration code please contact TMA.

Send file to TMA Software – Used for support. It opens a Windows Explorer window from where you can navigate to find a file that you want to send TMA Software. Double-click on the file and it sends it to TMA Software. There is a size limit.

Register Product - This is where you can enter your license registration code. If you need a registration code please contact TMA.

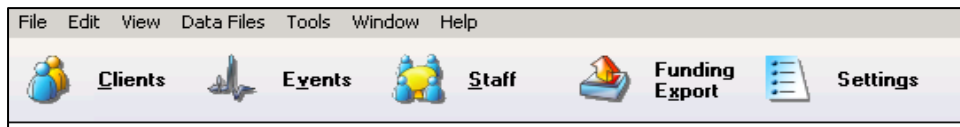
Colour Legend – This will display a legend of all the different colour codes used in TMA Central.

Send Feedback Online -> Email Enhancement Request – Not used

Send Feedback Online -> Email Bug Report – Not used

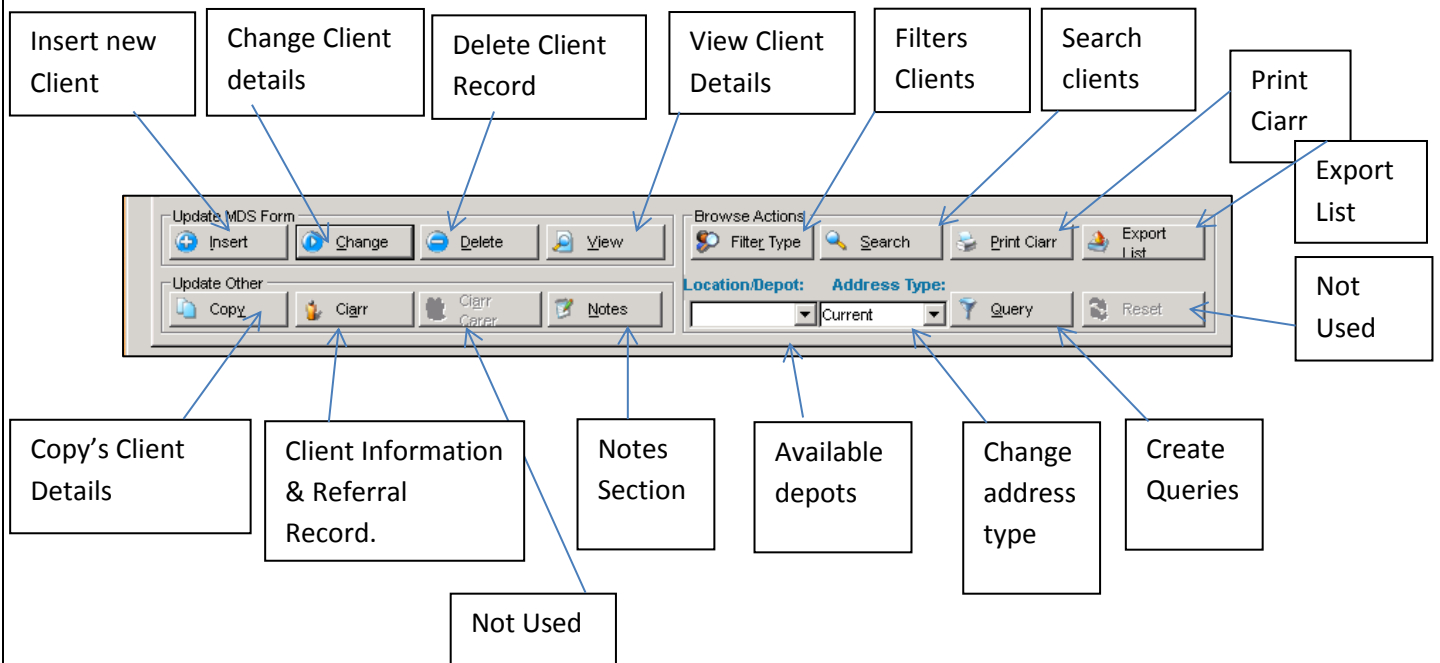
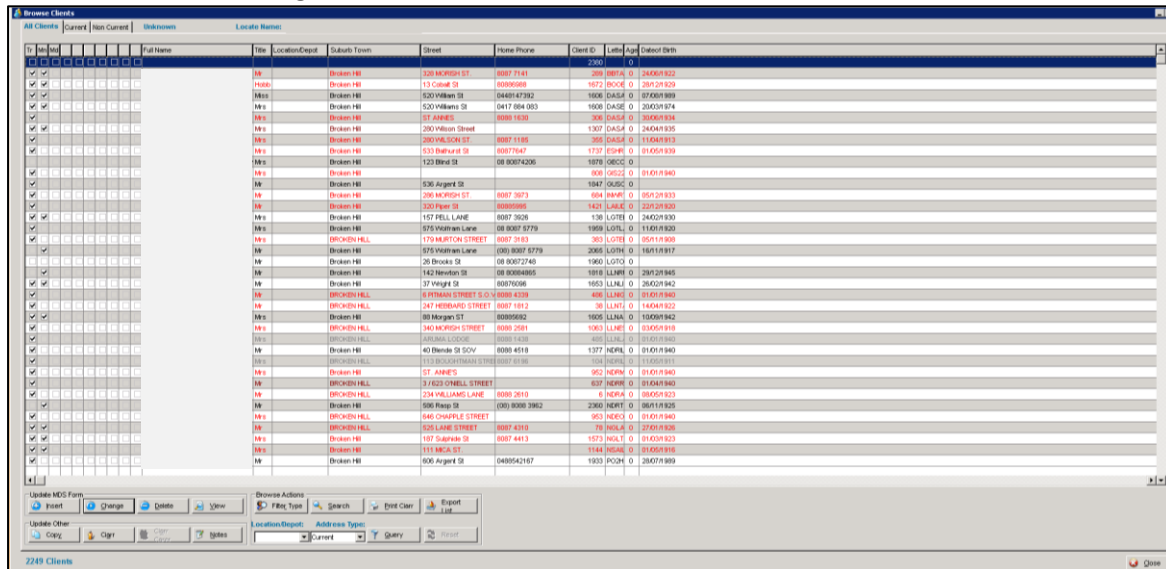
About TMA Central– This will display the database connections and general information about TMA Central and the contact information for TMA Software. Used for support.

Tool Bar Menu Breakdown.

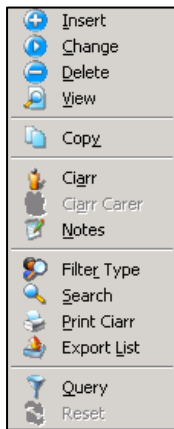


Clients

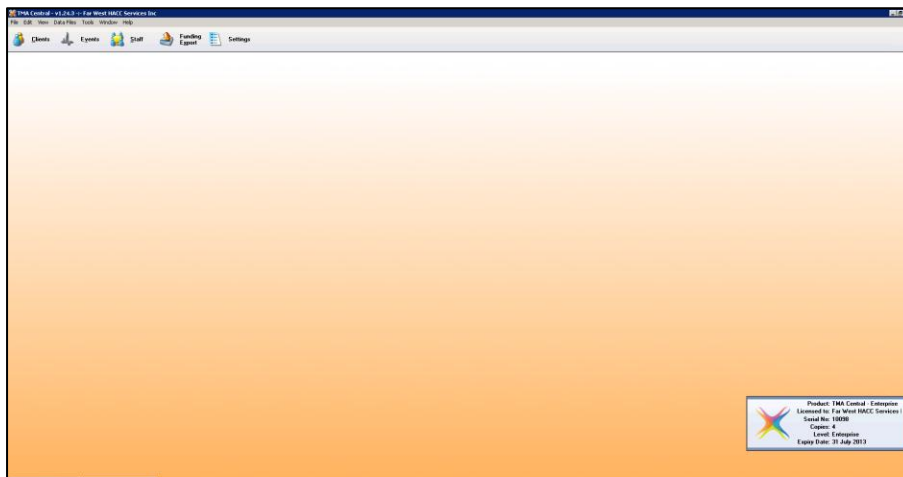
This window will display All Clients and also allow you to insert new Clients or Carers, modify existing records or delete existing records.



These options can also be accessed by Right Clicking on a Client record

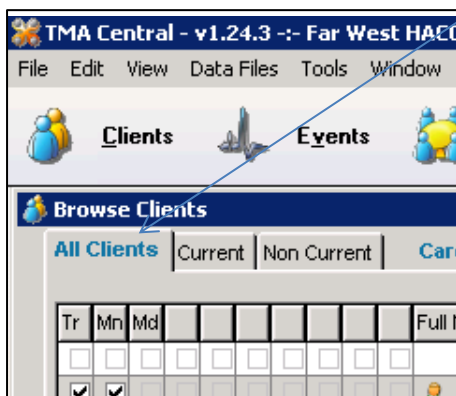


Adding a new Client.



To enter a new client or carer and update their information you need to click on '**Clients**' on the tool bar at the top left hand side of the screen. The client main window will display.

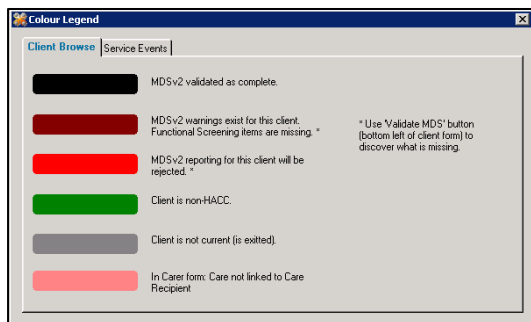
Notice the tabs along the top of the Browse Client window, **All Clients, Current and Non Client**. All Clients displays all the records in Clients table, Current displays only clients where Client is Current is ticked in the client record. Non-Current is a list of clients records where Client is Current is not ticked. E.g. exited clients have the Client is Current tick removed.



If you have had clients imported from an earlier program you will notice that the client's records can appear in up to five different colours. As you progress with using TMA Central the various colours will provide instant recognition of the state of client records.

Colour Legend

You can access this window by Help -> Colour Legend.

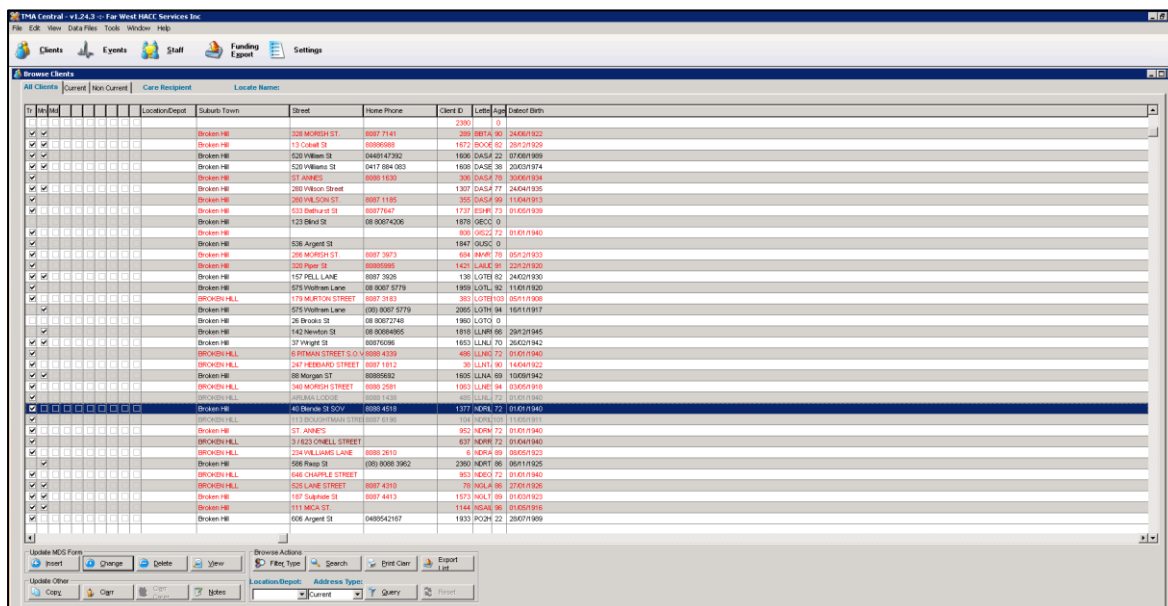


RED means the MDS2 will reject. This comes from any of the aqua fields in the eight pages being unfilled (left blank). It also indicates that a care recipient has a carer but the carer has not been linked to the client. **High priority**
MAROON is a warning that the MDS2 will not be rejected but you will be warned that you are missing data information. **Medium Priority**
GREEN will show clients who are Non-HACC e.g. Health, DVA or CTO
BLACK indicates all information has been entered and carer (if applicable) has been linked. The MDS2 validated as complete. **Finalised**

The ideal situation is to have all your HACC clients appearing in BLACK. Clients set to Non HACC, (coloured green) will not be included in the MDSExport.

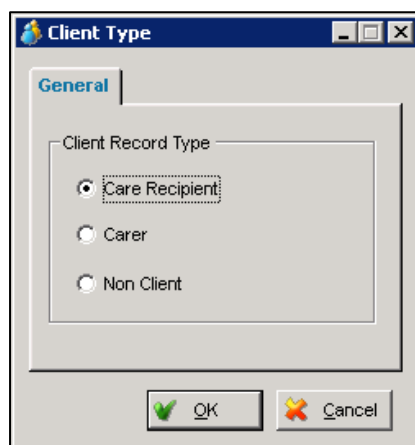
Care Recipient Input Form

This Care Recipient Input Form (Client Browse) consists of eight pages. This guide will step you through the pages one by one, explaining each page individually.



To enter or change clients details click on **insert**. The first step is establishing the Client Type.

The Client Type selection enables you to choose what type of client you are entering. Select the appropriate type for the client you are recording then click OK. "Non-Client" is used where you want to show the names of people who aren't clients in Trips run lists, e.g an second driver for long haul bus trips.

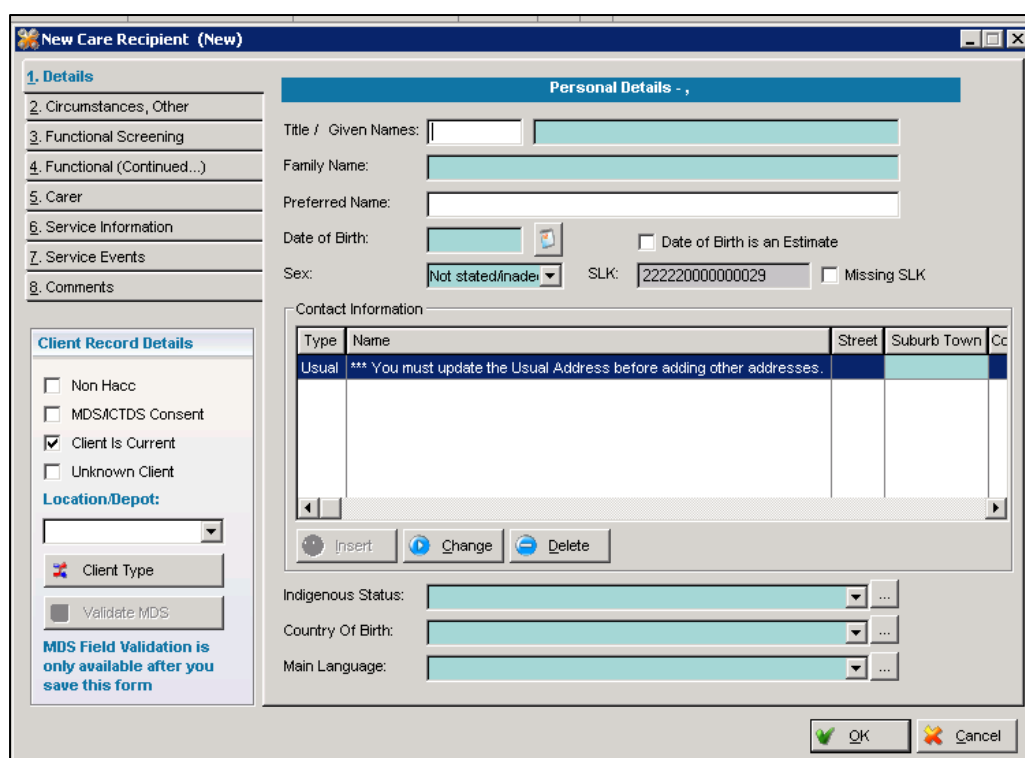


The 'Client Type' dialog box has a 'General' tab. It contains a group box 'Client Record Type' with three radio buttons: 'Care Recipient' (selected), 'Carer', and 'Non Client'. At the bottom are 'OK' and 'Cancel' buttons.

Below is the first of the eight pages for entering client information.

See the tabs for the eight pages. You are able to go from page to page by simply clicking on 1 to 8 or using the keystrokes Alt-1 ... Alt-8.

Enter the client's **Personal Details**, their title, given names, family name, preferred name, date of birth and sex. If you do not have their exact date of birth, you can enter an estimated date and select **Date of Birth is an Estimate**.



The 'New Care Recipient (New)' form has a left-hand navigation pane with tabs 1 through 8. Tab 1, 'Details', is active. The main area is titled 'Personal Details -'. It includes fields for 'Title / Given Names', 'Family Name', 'Preferred Name', 'Date of Birth' (with a calendar icon and a checkbox for 'Date of Birth is an Estimate'), 'Sex' (a dropdown menu), and 'SLK' (a text field with a checkbox for 'Missing SLK'). Below these is a 'Contact Information' table with columns 'Type', 'Name', 'Street', 'Suburb Town', and 'Cc'. The table has one row with 'Usual' in the 'Type' column and a message in the 'Name' column. At the bottom of the table are 'Insert', 'Change', and 'Delete' buttons. Below the table are fields for 'Indigenous Status', 'Country Of Birth', and 'Main Language', each with a dropdown menu. At the very bottom are 'OK' and 'Cancel' buttons.

Client Record Details

- ☐ Non Hacc
- ☐ MDSACTDS Consent
- ☒ Client Is Current
- ☐ Unknown Client

Location/Depot:

Client Type

☐ Validate MDS

MDS Field Validation is only available after you save this form

Next, you will need to enter the client's usual and current address plus other contacts for the client such as an Emergency, GP, Postal or other contacts you require.

Entering Addresses

The first step is to double click on the blue field in Contact Information. The Address Details box will appear over the Client's first page. See below.

Notice the Address Type **Usual** is selected; this is the automatic program selection when entering a client.

The screenshot shows the 'Update Address (For:)' dialog box. The 'General' tab is selected, and the 'Address Details' section is visible. The 'Address Type' section has radio buttons for 'Usual', 'Emergency', 'Postal', 'Current', 'GP', and 'Other'. The 'Usual' radio button is selected. Below this are fields for Name, Street, Suburb Town, Post Code, State Territory Identifier, LGA, Map Reference, and Zone. There are also fields for Home Phone, Work Phone, Mobile Phone, Fax, and Email, with a 'Silent Phone' checkbox. At the bottom, there is a checkbox labeled 'Copy Usual Address To Current Address' which is checked. The 'OK' and 'Cancel' buttons are at the bottom right. The background shows the 'New Care Recipient: (New)' window with a sidebar menu and a 'Client Record Details' section.

If this is the client's current address as well (or if the current address is similar) leave the tick in the '**Copy Usual Address to Current Address**'. If the client is not at their usual address, untick the '**Usual Address to Current Address**' then you will need to enter their current address separately.

Once you have entered your information click OK. You will then need to enter other contacts for the client. To enter other contacts select **Insert** below the Contact Information display.

Example, address type select **Emergency**. Enter the Emergency contact's details and click on OK. You will now see the Emergency contact appear in the Contact Information display. Repeat this procedure for other contacted needing to be entered (as many as needed)

Type	Name	Street	Suburb Town	Code	Home Phone	Work Phone
Usual			Broken Hill	2880	0448147392	
Current			Broken Hill	2880	0448147392	
Emergency			Broken Hill	2880	0417 884 083	
GP						08 80829777

Click on the arrow of the right-hand side of the first aqua field asking for a client's indigenous status. The above drop box above will appear. Double click on your selection. The selected information should now appear in the field.

When selecting Country of Birth and Main Language it is preferable to click on the square button to the right of the entry box. When the list appears type the first few letters of the country or language you want then select it. This applies to these two lookups because they have so many items.

You have now completed the First page. To continue click on the second tab circumstances, Other.

Client Circumstances (Page 2)

The second page consists of the **Client's circumstances**. Do they have a carer, what type of pension are they on, living arrangement, are they a DVA card holder and accommodation setting.

You will need to complete each field using the same process as entering indigenous status etc on the previous page.

New Care Recipient (New)

Client Circumstances

Does this client have a carer? [Dropdown] ...

Living Arrangements: [Dropdown] ...

Government Pension/Benefits: [Dropdown] ...

DVA Card: [Dropdown] ...

Pension Card Number: [Text Field]

Accommodation Setting: [Dropdown] ...

Relevant Health Information

What does the client see as difficulties and/or health problems (e.g. hearing, allergies, incontinence)? [Text Area]

How will any of these affect service delivery? [Text Area]

Client Record Details

☐ Non Hacc

☐ MDSACTDS Consent

☒ Client Is Current

☐ Unknown Client

Location/Depot: [Dropdown]

Client Type [Button]

Validate MDS [Button]

MDS Field Validation is only available after you save this form

OK Cancel

On this page, you also need to enter **Relevant Health Information** such as hearing, allergies, incontinence. You are also able to enter if or how their health problems will affect service delivery.

Simply enter the appropriate information in the boxes provided above. This information is not sent with your MDS but will appear on CIARR referrals.

When you have completed this page continue to page 3 **Functional Screening**.

Functional Screening (pages 3&4)

Functional Screening carries over two pages and consists of 14 questions.

Once experienced entering the data for clients you can use numbers to enter your selections. Tab from the first field to the seventh field entering appropriate information e.g. 1 = Without help, 2 = With some help, 3 = Completely unable (except Transport where 3 = specialised vehicle or ambulance) 4 = Not stated/inadequately described. You are able to use this system for both pages 3 & 4.

The screenshot shows the 'New Care Recipient (New)' form, page 3: Client Functional Screening. The left sidebar contains a navigation menu with items 1 through 8, where '3. Functional Screening' is highlighted. Below the menu is the 'Client Record Details' section with checkboxes for 'Non Hacc', 'MDS/CTDS Consent', 'Client Is Current' (checked), and 'Unknown Client'. There is also a 'Location/Depot:' dropdown and a 'Client Type' button. At the bottom of the sidebar, there is a 'Validate MDS' button and a note: 'MDS Field Validation is only available after you save this form'. The main content area is titled 'Client Functional Screening' and contains ten questions, each with a dropdown menu and a '...' button. The questions are: 'Ability to do HOUSEWORK:', 'Ability to get places further than walking distance. (TRANSPORT):', 'Ability to go SHOPPING for groceries and clothes:', 'Ability to take own MEDICATION:', 'Ability to handle own MONEY:', 'Ability to WALK:', 'Ability to BATHE / SHOWER:', 'Does the client have MEMORY problems / CONFUSION?', and 'Does the client have BEHAVIOURAL problems?'. The bottom of the form has 'OK' and 'Cancel' buttons.

Continue on to the fourth page, **Functional (Continued...)** and complete all blue fields.

The screenshot shows the 'New Care Recipient (New)' form, page 4: Additional Client Functional Screening. The left sidebar is similar to page 3, but the navigation menu highlights '4. Functional (Continued...)'. The 'Client Record Details' section is the same. The main content area is titled 'Additional Client Functional Screening' and contains five questions, each with a dropdown menu and a '...' button. The questions are: 'Does the client need help to COMMUNICATE?' (selected: '4 - Not stated/inadequately described.'), 'Ability to DRESS themselves:' (selected: '1 - Without help'), 'Ability to EAT:' (selected: '1 - Without help'), 'Ability to go to the TOILET:' (selected: '1 - Without help'), and 'Does the client need help to get OUT OF BED / MOVE AROUND?' (selected: '1 - No'). The bottom of the form has 'OK' and 'Cancel' buttons.

Carer (Page 5)

As a carer has not been selected for this client, this page will remain empty. See below

New Care Recipient (New)

1. Details
2. Circumstances, Other
3. Functional Screening
4. Functional (Continued...)
5. Carer
6. Service Information
7. Service Events
8. Comments

Client Record Details

☐ Non Hacc
☐ MDS/CTDS Consent
☒ Client Is Current
☐ Unknown Client

Location/Depot:
[Dropdown]
[Client Type]
[Validate MDS]

MDS Field Validation is only available after you save this form

Carer Information

This section is disabled as the Client is specified as NOT having a Carer.

Carer Given Name: [Text] ☐ Missing SLK [Select]
Carer Family Name: [Text] [Remove]
Carer Date Of Birth: [Text] ☐ Carer Date of Birth Estimate Flag
Carer Sex: [Dropdown]
Area Of Residence: [Dropdown] [...]
Carer Suburb Town: [Text]
Carer Post Code: [Text]
Country Of Birth: [Dropdown] [...]
Carer Main Language: [Dropdown] [...]
Carer Indigenous Status: [Dropdown] [...]
Carer For More Than One: [Dropdown] [...]
Carer Residency Status: [Dropdown] [...]
Client Carer Relationship: [Dropdown] [...]

[OK] [Cancel]

However if a "Has a Carer" had been selected for the "Does this client have a carer?" item on page 2, you will need to collect the carer information and link the carer with the client. This procedure will be stepped out later in this document.

Continue to Page 6, **Service Information**.

Service Information (Page 6)

This page contains the final details of the assessment. Record the **Source of Referral**, **Date of Referral In** and **Service Episode Entry Date**.

When you re-assess a client or the client information is updated you need to enter a date in **Date of Last Update**.

New Care Recipient (New)

1. Details
2. Circumstances, Other
3. Functional Screening
4. Functional (Continued...)
5. Carer
6. **Service Information**
7. Service Events
8. Comments

Client Record Details

☐ Non Hacc
☐ MDS/ACTDS Consent
☒ Client Is Current
☐ Unknown Client

Location/Depot:
[Dropdown]
[Client Type]
[Validate MDS]

MDS Field Validation is only available after you save this form

Service Information

Source of Referral In: [Dropdown]
Date of Referral In: [Date Picker]
Target Of Referral Out: [Dropdown]
Date Of Referral Out: [Date Picker]
Service Episode Entry Date: [Date Picker]
Service Episode Exit Date: [Date Picker]
Date Of Last Update: [Date Picker]
Account Code: [Text Field]
Main Cessation Reason: [Dropdown]

Time Taken to Complete Form

☐ I would like to make a new assessment Service Event
Hours: [Dropdown] Minutes: [Dropdown]
Last Assessor Name: [Text Field]

OK Cancel

When you refer this client to another agency, you will need to fill in **Target of Referral** and **Date of Referral out**. (Complete only if referring to another service)

Your MDS will not be rejected or seen in error if the Target of Referral and Date of referral out are left blank

Time Taken to Complete Form is on this page so people don't forget to record their service times. It is advised you enter the assessment time as this information is sent to DADHC. This information will provide the funding body with the amount of time it has taken to assess a client and enter their information.

Tick the box "I would like to make a new assessment Service Event". A Multi Service Detail box will appear. See below.

No.	Agency Name	Funding Source	Type
1	☐ Transport	(10824) Transport HAC	
2	☐ Maintentanc & Mod		
3	☐ Medical/Hospital		

Enter the hours and minutes and your name then click OK.

A window will appear so you can select the service against which the Assessment time will be recorded.

Service Events (Page 7)

This page enables you to record instances of service, particularly where they cannot be created in Trips or other service programs that work with TMA Central. If your main service is Community Transport then Trips will record the number of trips and transfer that information to TMA Central. In this case you do not have to enter information into this section other than for client assessments.

Service organisations that are funded to provide more than one service are able to enter information for the **service event** (or events) directly into this Service Events list. For instance if a Community Transport service also provides Home modification to a client you can enter the value on this page.

Service Events			
Date	Description	Value	Service Name
01/10/2006	Home modification	30	(10634) Maintentanc & Mod
16/03/2012	Transport - Care Recipient	1	(10824) Transport
26/03/2012	Transport - Care Recipient	1	(10824) Transport
30/03/2012	Transport - Care Recipient	1	(10824) Transport
30/03/2012	Transport - Care Recipient	1	(10824) Transport

Enter a new **Service Event** by clicking on **Insert**. A small window labelled **New Service Event** will appear. You will need to enter the date, service and select your service type. Each service event is valued differently.

For example Meals on Wheels is valued by the number of meals, Home Maintenance is valued by the amount of hours. Once you have made your selection click on OK and the event will appear in the Service Events list. You are able to update the Events when required.

Other Comments (page 8)

The comments you record on this page will not be sent with your MDS or transferred to any service program. This information is not transferred to Trips (will not appear on a runsheet); therefore if you need to record the information in the client browse in Trips you are able to cut and paste the information.

You are able to record more confidential information for a client on this page as it stays in TMA Central.

New Care Recipient (New)

1. Details
2. Circumstances, Other
3. Functional Screening
4. Functional (Continued...)
5. Carer
6. Service Information
7. Service Events
8. Comments

Client Record Details

☐ Non Hacc
☐ MDS/MCTDS Consent
☒ Client Is Current
☐ Unknown Client

Location/Depot:
[Dropdown Menu]

Client Type
 Validate MDS

Other Comments

OK Cancel

You have now completed your data entry for a new client. Click OK.

This Client will now be displayed in the Client Browse page. You will notice for a client a small head of a person will appear before their name. If they have a carer and the carer has been linked to them, you will see two small heads against their carer.

You now need to select the **Service Types you require for the client**. Note there will be no ticks appear in their transport purpose box.

Service assignment

The **service assignment*** needs to be selected even if your client only receives transport. Tick on the transport column box, once the box is ticked the client record will transfer to the Trips program. If the client project assignment is left unchecked, it will only appear in TMA Central. (In early versions called “project assignment”)

If the client receives other services such as Home Maintenance, Meals on Wheels etc their project assignment will also require to be ticked.

<

Inserting a Carer

Click on insert at the Client Browse window and the small **Client Type** window will display. See below. **Select Carer**, then click on OK

Client Type

General

Client Record Type

☐ Care Recipient

☒ **Carer**

☐ Non Client

OK Cancel

See the page below. Firstly, you will notice the Carer information form only has three pages. The first page being the **Carer's Details, Contact information, Country of Birth, Main Language, Indigenous Status and Carer for More than One.**

Fill in the Carers Information following previous steps for entering a Care Recipient's information.

New Carer (New)

1. Carer Details

2. Carer For

3. General Comments

Carer Details - ,

Title / Given Names:

Family Name:

Preferred Name:

Date Of Birth: ☐ Date of Birth is an Estimate

Sex: SLK: ☐ Missing SLK

Contact Information

Type	Name	Street	Suburb T
Usual	*** You must update the Usual Address before adding other addresses.		

Country Of Birth: ...

Main Language: ...

Indigenous Status: ...

Carer For More Than One: ...

☐ Is Non Hacc

☒ Client Is Current

Location/Depot:

MDS Field Validation is only available after you save this form

The “**Carer For**” (2nd page) will display the Care Recipient/s who this carer cares for once the linkage has occurred. Go to the “General Comments’ page and add comments as required. Click OK to finish the Carer entry.

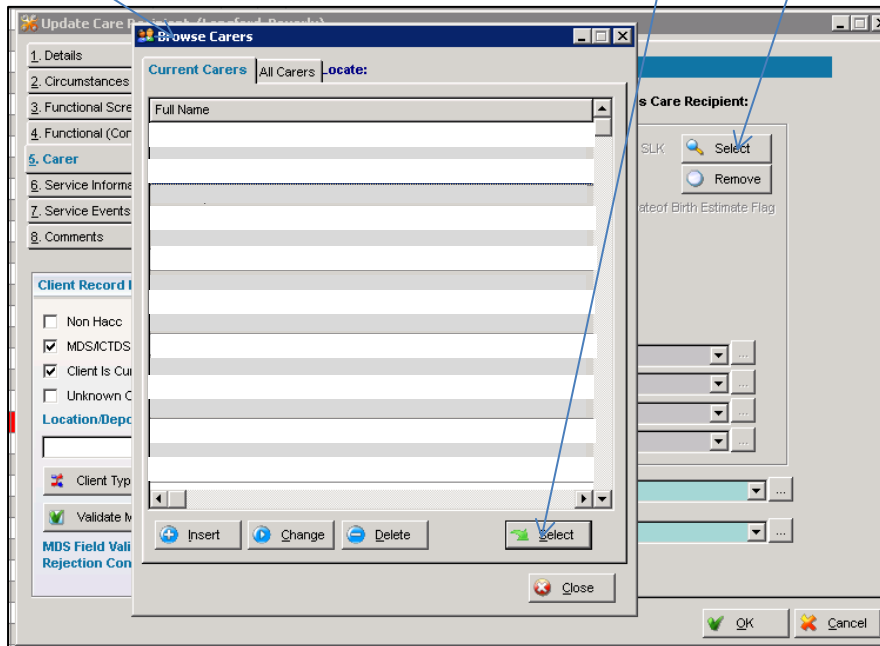
Then of course, you must still make sure that the Carer you have selected has all their MDS fields filled out. You can check this by using the “Validate MDS” Button which is available on both the Care and Care Recipient Update Forms.

Link the Care Recipient Record to a Carer

Double-click on the record of the Care Recipient who has the Carer you just entered. (Or enter the Care Recipient if the Carer record was entered first.)

In the **Care Recipient's details**, select page five, labelled **Carer**.

You will now need to link the carer with the care recipient. Click **Select**. A Carer Browse page will display. Highlight the appropriate carer and click on **select**.



Once you have clicked on '**select**' the Carer's information will display in the Care Recipient's form.

Note: A Carer cannot be linked to a Care Recipient unless in the Care Recipient's information has stated that they have a carer. See page 2 for Care Recipient and the first blue field '**Does this Client have a Carer?**' This aqua field needs to state '**Has a Carer**'.

If your service delivers service events to the carer (e.g. provides respite or transports the carer) you will need to assign a service to the carer. The '**service assignment**' needs to be selected for the Carer to appear in Trips. If left the client project assignment is left unclicked it will only appear in TMA Central. Follow the same procedure as for a Client.

MDS Field Validation

Why isn't the MDS Field Validation stating SUCCESS?

You are able to check the MDS Validation at any time when entering or changing a Care Recipient's information in the Client Browse. The **Validate MDS** selection button is at the bottom left of each Care Recipient's eight pages

Update Care Recipient (ABBOTT, Margaret)

1. Details

Personal Details - ABBOTT, Margaret

Title / Given Names: Mr
Family Name:
Preferred Name:
Date of Birth: 24/06/1922 90 YRS ☐ Date of Birth is an Estimate
Sex: Female SLK: BBTAR2406192222 ☐ Missing SLK

Contact Information

Type	Name	Str	St	Code	Home Phone	Work Phone
Other						
Usual		328	Br	2880	8087 7141	
Current		328	Br	2880	8087 7141	
Emergency		328	Br	2880	08 80877141	
CP						

Indigenous Status: Neither Aboriginal nor Torres Strait Islander origin
Country Of Birth: Australia
Main Language: English

Client Record Details

☐ Non Hacc
☒ MDSACTDS Consent
☒ Client Is Current
☐ Unknown Client

Location/Depot:

MDS Field Validation:
Rejection Conditions Exist.

If the MDS is rejected Click on the **Validate MDS** button. This will give you reasons for MDS failure.

Browse the MDS Validation File

MDS Validation - Results

MDS Field Validation Results

- Care Recipient - Functional Status
 - Medication - Warning
 - Money - Warning
 - Memory - Warning
 - Behaviour - Warning
- Carer - Information
 - Carer, Existence Of is set to "Has a Carer" but no Carer is specified - Rejection
 - Carer For More Than One - Rejection
 - Carer First Name - Warning
 - Carer Surname - Warning
 - Carer Letters Of Name - Rejection
 - Carer Date Of Birth - Rejection
 - Carer Sex - Rejection
 - Carer State Territory Identifier - Rejection
 - Carer Suburb Town - Rejection
 - Carer Post Code - Rejection
 - Carer Country Of Birth - Rejection
 - Carer Main Language - Rejection
 - Carer Indigenous Status - Rejection

To correct items found, return to the Care Recipients information pages (by clicking on Close) and enter or change the appropriate information. The rejection conditions will exist until all blue fields are completed. The warning will be displayed at the bottom of client form. Once you have addressed the warnings listed, the message at the bottom of the page will change from rejection to success.

Ciarr

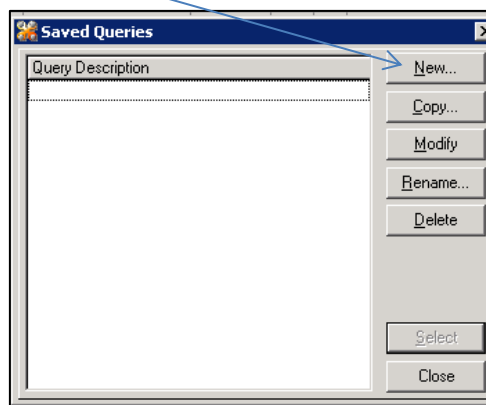
Client Information & referral Record this generates a report of Client Information to refer to another Organisation. The CIARR button is located at the bottom of the 'Client Browse window'.

Queries

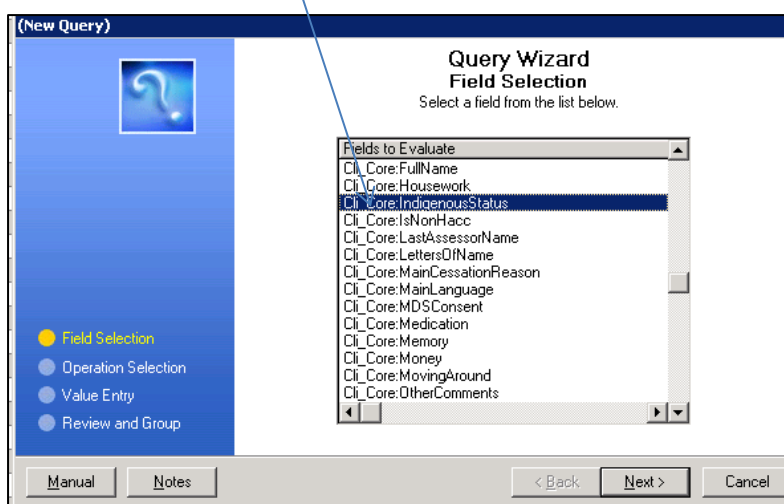
The Query button is located at the bottom of the Client Browse window. Queries are a way of extracting useful information from a database. The example below is a step by step procedure to create a Query to extract all the Non-indigenous clients age 65 years old or over.

Open the Client Browse Window and ensure it is set on the "Current" tab then click Queries button at the bottom of the Client Browse.

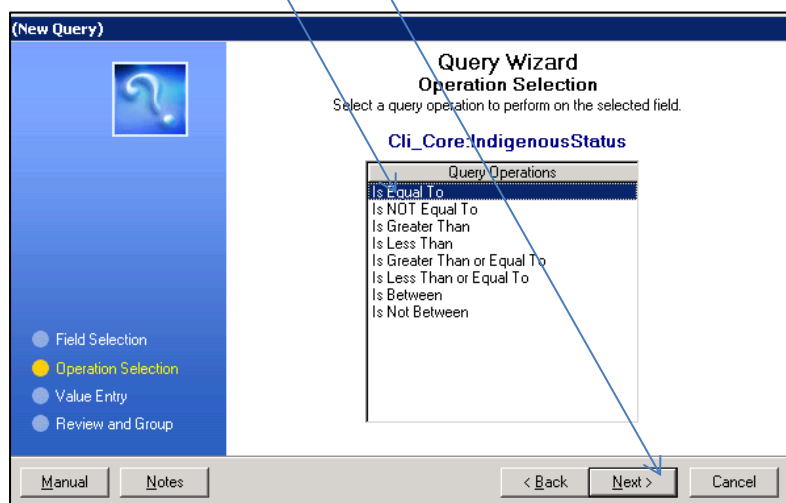
The following box will open. Click New



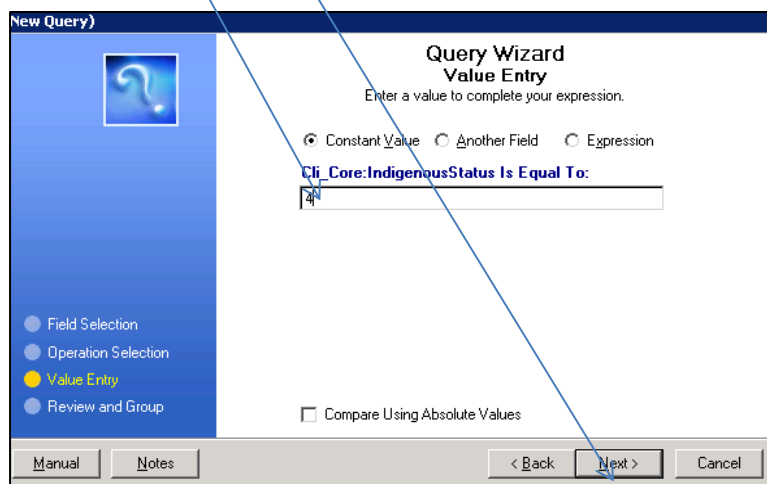
This will start the Query Wizard and will list all the available options for this example you will need to choose CII_Core:IndigenousStatus then next.



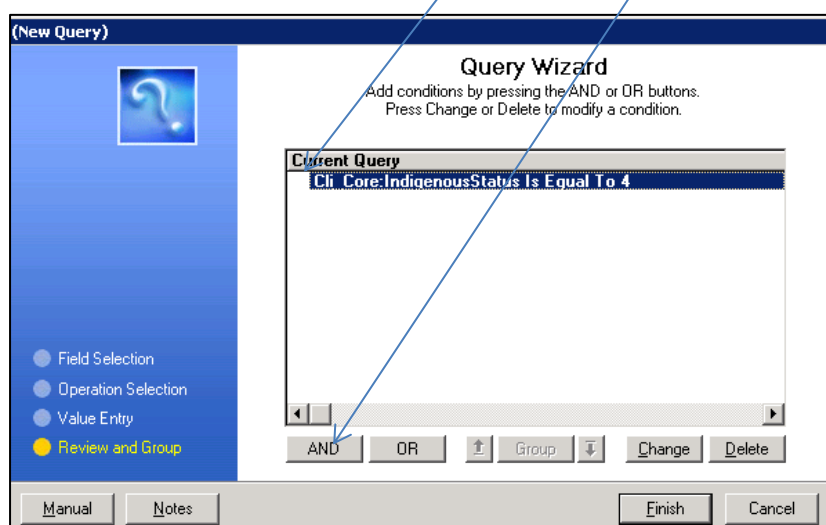
Then select Is equal to and next.



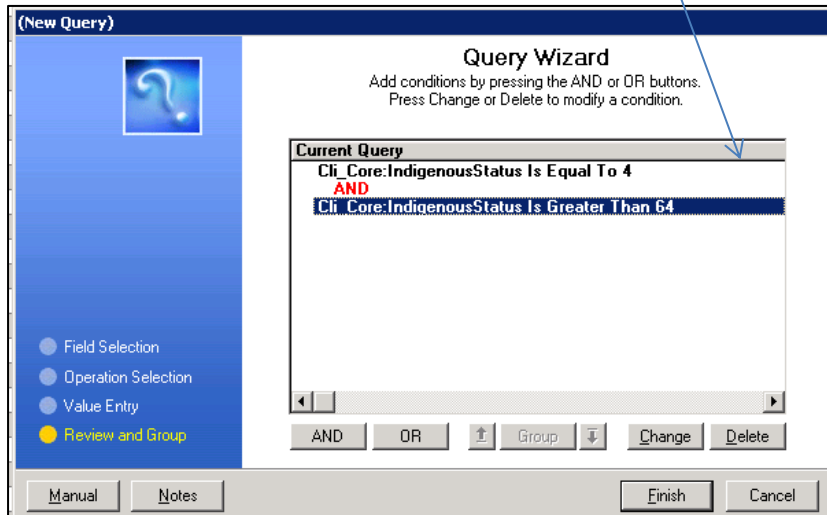
Type the value of 4. Then next



This will show you what you have done so far. Click AND



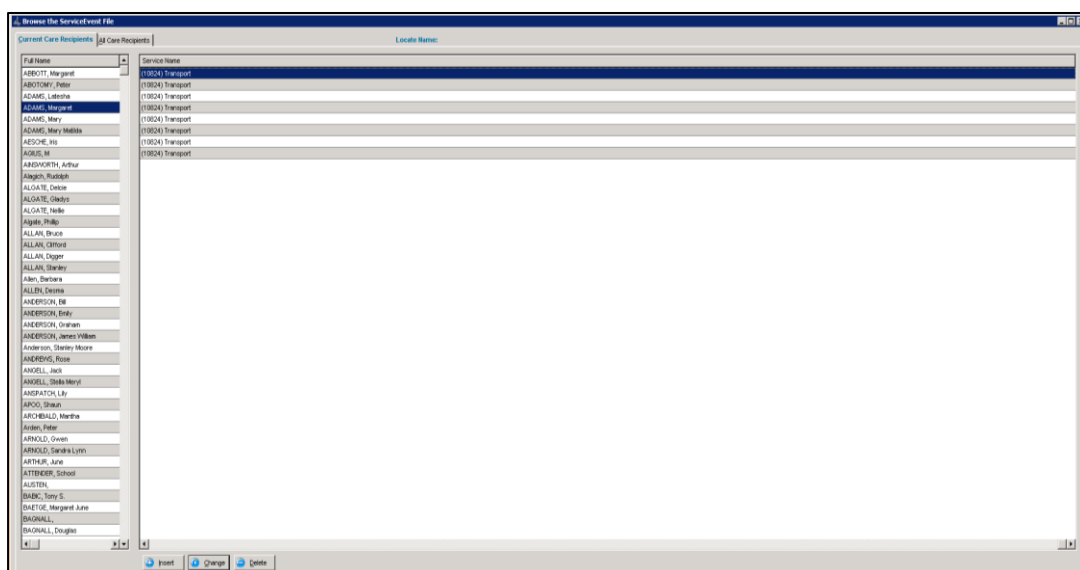
Clicking AND will take you back to the first step of the query process, repeat this step and click next, instead of choosing is Equal To choose is Greater Than and click next change the value to 64 and click next. You should see the following. Click Finish to create your Query this also gives you the option to save this query for future referencing.



Events

Events will display the services a Care Recipient has received and the number of services a Care Recipient has received. This is located on the Toolbar next to Clients.

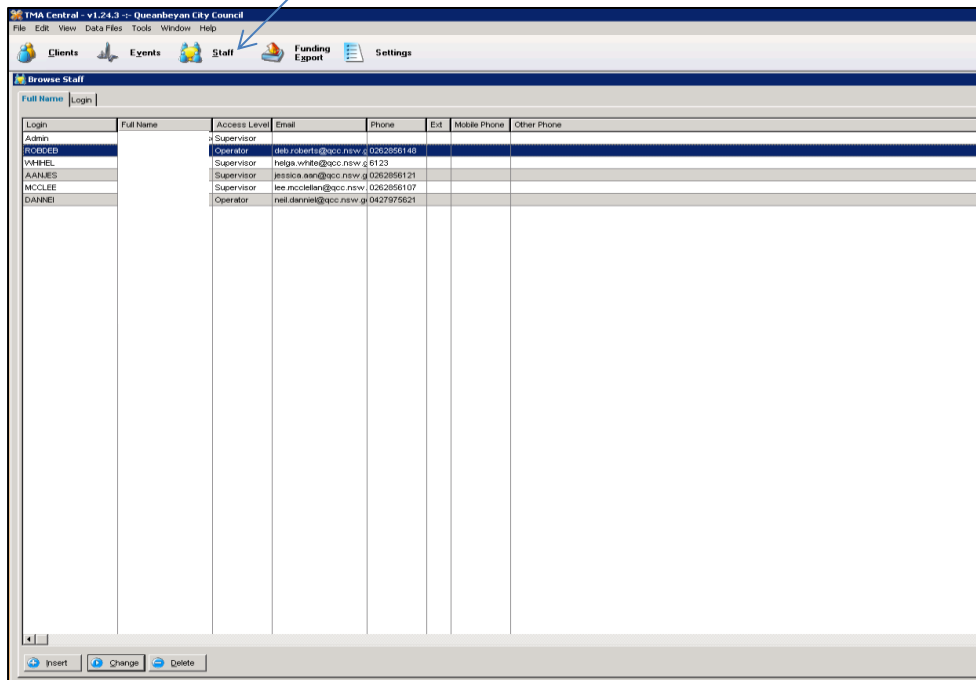
You are able to enter services a client has received by inserting the service received. To insert a new service or enter a value against an existing service is previously shown in the Inserting Client Recipient section.



Staff

Staff is where you can add, view, modify and delete staff members for TMA Central. The Staff button is located on the Toolbar.

Open the Staff window by left clicking on Staff. The following window will open.



To change an existing Staff member's Details click on the Staff Member listed in the Staff Window and click the change button in the bottom left hand corner next to insert. The Update Staff Record window will open. Make required changes and click ok.

Update Staff Record

Staff Details

First Name:

Last Name:

Login:

Password:

Email:

Phone:

Extension:

Mobile Phone:

Other Phone:

Global Access Level

☐ Supervisor ☒ Operator ☐ No Access

Service Feature Management

Community Transport

Insert Change Delete

OK Cancel

If adding a new user click insert in the bottom left hand corner of the Staff window, the New Staff Record window will open.

Enter Staff Details- Required fields are:

- First Name
- Last Name
- Login
- Password- This is case sensitive

Choose Global access level

- Operator – Will not have access to add other Users
- Supervisor- Will have access to add other Users

At Service Feature Management click insert.

The following window will open. Choose service assignment by clicking on the browse button and select the appropriate Service Name.

Select appropriate access level. Manager will have access to all features.

New Feature Management Record

General | Trips New Journeys | Trips Health Features

Service Assignment

Service Name:

Access Level

☐ Manager (Highest) ☐ Supervisor (High)

☐ Normal User (Default) ☐ New User (Low)

☐ Booking Staff (Restricted)

Trips General Features

☐ Enable Trips Notifications Window

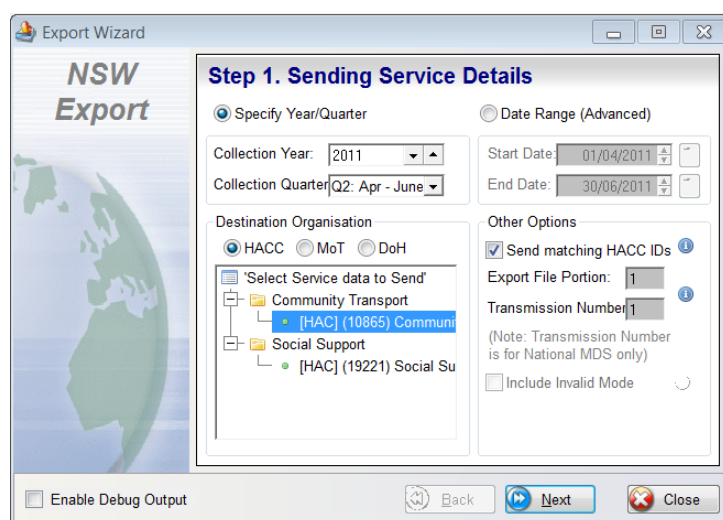
☐ Disable Visual Themes

Tool Tip Timeout: (in seconds)

Make sure the 'enable Trips Notifications Window' checkbox is not ticked and click ok.

How to send MDS

1. Transfer the data from your **Service Program** or programs (Trips Enterprise, Caremaster etc.).
2. In “TMA Central” click on the “Funding Export” button on the toolbar. The “Export Wizard – Step 1” will appear:



Note: If the toolbar under the menu line isn't visible on the opening screen of “TMA Central”, it is because you are running a screen resolution of 800x600. In this case select Tools/MDS Export from the main menu.

3. The wizard will probably have selected the correct year and quarter for you. If not, manually change the Collection Year and/or Collection Quarter.

4. Ensure “HAC” is selected in the “Destination Organisation” box.

Note: Some services have more than one HACC funding contract. These should have been entered in TMA Central's “Settings” window with their appropriate contract numbers. Other services have more than one TMA program that record MDS data for the same HACC contract number. The HACC Contract number is also called the “HACC MDS ID”.

5. If you have more than one HACC funding contract then select the one for which you wish to send the MDS at this time.

6. If you have several TMA programs that record MDS data for the same HACC MDS ID, select one of the “Destination Organisations” with that HACC MDS ID, then tick the checkbox “Send matching HACC ID's” on the right. This will include all of the TMA Programs with that HACC MDS ID in the one Transmission.

Note: If you wish to send separate MDS transmissions for services that share a HACC MDS ID then you will have to ensure you give each transmission a unique File Portion Number. If you don't provide unique File Portion Numbers then later transmissions sent will overwrite (delete and replace) previous transmissions for that HACC MDS ID. See “Other Options” in the picture above.

7. Click the “Next” button. The “Step 2 Processing” page of the wizard (not shown here) is just for your information. Click “Next” again.

Note: You may close the wizard at any stage without losing client MDS information.

8. When the processing is complete this window appears.

The preview button allows you to see a list of the client's records that are valid for MDS export and another list showing client's records that are not validated for MDS export. (See next section)

The "Save" button allows you to save the MDSExport file to any folder you choose. If you are not sure, save it to your Desktop. Then open your email program (e.g. Outlook) and attach the MDSExport file to an email addressed to your MDS Repository.

The "Email" button allows you to email the MDSExport directly to the MDS repository.

Note: TMA Central will only do this if your email details have been set up in Control settings and the IT people for your organisation allow it and set it up for you.

The Preview Screen

Valid for MDS Export | NOT Valid for MDS Export | All Records | MDS Export Preview

Tr	Ss	Client Name	Client ID	Consen	LOLI	LOFI	Dateof Birth	DOB Estimate	Sex	Country Of Birth	Main Le
☒	☒		1715	1	AGN	IL	09/02/1926	2	2	1101	120
☒	☒		1151	1	ANE	IL	29/07/1917	2	1	1101	120
☒	☒		975	1	ARI	AR	05/08/1920	2	2	2105	120
☒	☒		1637	1	AWO	OB	24/11/1938	2	1	1101	120
☒	☒		950	1	ENO	ER	15/04/1928	2	1	1101	120
☒	☒		664	1	ILI	AM	26/10/1925	2	1	1101	120
☒	☒		1145	1	ILI	AN	20/05/1926	2	2	2105	120
☒	☒		1634	1	LAK	OD	26/10/1954	2	1	1101	120

Record Count: N/A

View | ☐ Enable Client Count | ☐ Show Non Hacc Clients | Filter Service | Filter String

The Tabs

Valid for MDS Export shows the records that are going to be included in the MDSExport file if you send it without revision.

NOT Valid for MDSExport displays the records that have been transferred from Trips that are not going to be included in MDSExport file if you send it without revision.

All Records displays all records transferred from one or more service programs that use the HACC MDS ID selected.

MDS Export Preview allows you to preview, client by client, the records that are valid for export. You can use the buttons at the top of the window to print the list or save it to an Excel file.

The Buttons and Checkboxes (at bottom of screen)

View button allows you to view the MDS Service Category and the number of instances of service for the highlighted record in the list. It also has an MDS Validation button that provides comment on why a record might not be valid for MDS.

Enable Client Count shows you the client count of records in the selected Tab category.

Show Non HACC Clients will allow you to view other Funding Types than HACC.

Filter Service allows you to show records limited to one service program, e.g. Transport.

Filter String allows you to limit the record list by entering a string, e.g. Social Support

Using the MDS Preview facility

Each person can work out the best strategy for their service. A typical strategy is to select the “Not Valid for MDS Export” tab and look at the various records. There are a number of reasons why a record isn’t valid, and only checking them (by double-clicking on the record) will let you know what the reason is.

Evaluation of records that are “Not Valid” requires application and persistence. Some are “not valid” for a valid reason, e.g. You are sending the HACC MDS and the record is CTP (NSW Transport) funded.

The data flows from the entry of a record in a service program such as Trips, through to it being included in a Service Event record in TMA Central and then it is combined with the client’s demographic data and compiled into the MDS or ICTDS transmission. Understanding this train of events makes it easier to use the available tools to troubleshoot service event shortfalls or errors.

Sending the MDS Export file

Once you have saved your MDSExport.xml (NSW) or MDSExport.csv (National) file you can send it by attaching it to an email addressed to your MDS Repository.

The address can vary from state to state. You don’t have to put a message in the email but you could put your services’ name in the subject line. The file attached contains information on the sender and identifies the computer program that produced the file.

In NSW there is a new address; **mds@dhs.nsw.gov.au**.

Settings

When you have a brand new TMA Central program that hasn't had data from an earlier program brought into it, you need to set up your program for use.

The screenshot shows the 'Update Control Settings' dialog box with the 'General Project Identity Details' tab selected. The left sidebar contains 'Project Identity', 'Service Details', 'Email Settings', and 'Program Configuration'. The main area contains the following fields:

- Project Name:** [Text Field]
- Legal Name:** [Text Field]
- Region:** [Text Field]
- Primary Contact:**
 - Name:** [Text Field]
 - Title:** [Text Field]
- Postal Address:**
 - Street:** [Text Field]
 - Suburb:** [Text Field] **State / PostCode:** [Text Field] [0]
- Street Address:**
 - Building/Street:** [Text Field]
 - Suburb:** [Text Field] **State / PostCode:** [Text Field] [0]
- Communications:**
 - Phone:** [Text Field] **Fax:** [Text Field]
 - Mobile:** [Text Field]
 - Email:** [Text Field]

At the bottom are 'OK' and 'Cancel' buttons.

Project Identity

Enter your project and organisation information into the appropriate fields.

The screenshot shows the 'Update Control Settings' dialog box with the 'Multi-Service Configuration Settings' tab selected. The left sidebar contains 'Project Identity', 'Service Details', 'Email Settings', and 'Program Configuration'. The main area contains:

- Service Name and Funding Source Details:** A tree view with folders 1 through 10. Folder 1 is expanded and selected.
- Service Details:**
 - Service Number:** 1
 - Service Name:** Transport
 - Abbreviation:** Tr
 - File Portion:** 1
- HELP:** Select an item in the tree on the left and either double-click to change or mouse right-click to insert/change/delete items.

At the bottom are 'Insert', 'Change', and 'Delete' buttons, followed by 'OK' and 'Cancel' buttons.

Service Details

This is where you provide your Service names and Funding Source Details. This information is used to link with your Service Programs (Trips Enterprise, MnM and Caremaster)

Update Control Settings

Project Identity
Service Details
Email Settings
Program Configuration

Email System Setup

Repository Email

Other Recipient: [dropdown] [button] [info]

MDS Email: [text box]

MoT Email: [text box]

DoH Email: [text box]

Other MDS Settings

MDS Standard: [NSW Standard] [dropdown]

Accept HTML Email Formats

☐ Yes ☐ No

Email Method

☐ SMTP ☒ MAPI (Outlook or Outlook Express)

Outgoing Mailserver: [mail.westnet.com.au]

☒ Use SMTP Authentication

SMTP User Name: [text box]

SMTP Password: [text box]

OK Cancel

Email Settings

MDS Email: Provide the email address for your state MDS.

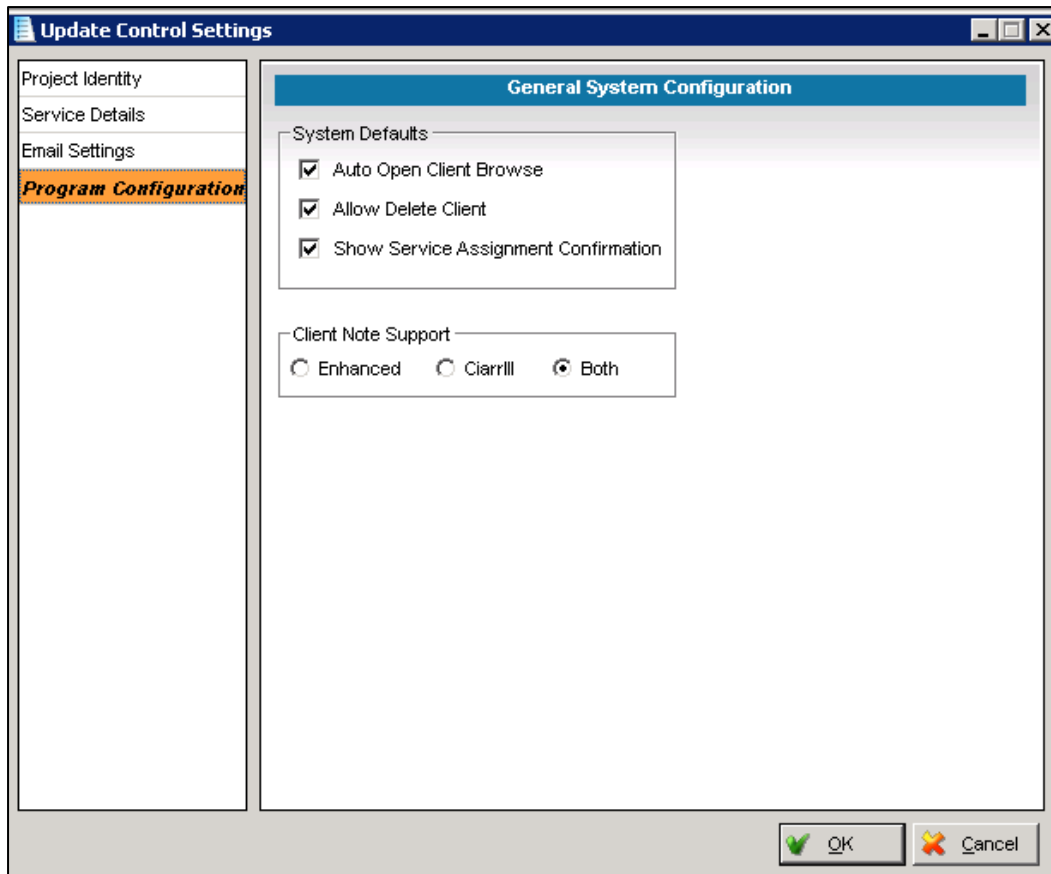
MoT Email: Provide the email address for Ministry of Transport.

DoH Email: Provide the email address required for Department of Health.

Other MDS Settings: This drop down box allows you to select your MDS standard.

Accept HMTL Email Formats: This check box will allow HTML email formats.

Email Method: This shows you your server connection details.



Program Configurations

This is where you can change a few General System Configurations

Auto open Client Browse: If this is selected the Client Browse window will automatically open when you log into TMA Central.

Allow Delete Client: This allows you to delete Clients from TMA Central. If a client record is for a client that has been assessed for your service but is not having service then make the client non-current. Don't throw away valid history. If you make a mess of a record as you are entering it or it is a double-up then delete it.

Show Service Assignment Confirmation: This will display a confirmation message when changing Service assignments.